REALTY|share

Asset Collaboration

Legacy Document Migration

Integrated Desktop Solution

Yardi DMS Integration

Document Management

Property Portal

Mobile Access

Deal Document Management

SharePoint

COMPREHENSIVE DOCUMENT MANAGEMENT SOLUTION FOR REAL ESTATE

REALTY|share is a SharePoint solution that allows real estate owners and property managers to efficiently store and access property-centric documents

Don't Reinvent the Wheel — Let Our Real Estate Technology Experience Accelerate Your Cloud Journey.

REALTY|share

✉ engage@realtyshare.net | 🌐 www.realtyshare.net

Secure and Efficient Property Document Organization

Our document management system offers a secure, centralized platform for all your critical real estate documents. Get out of the folder-based system you've used for years and take advantage of all SharePoint has to offer.

- → A taxonomy custom-developed to fit your organization means documents are better organized and categorized from the point of migration through to daily use
- → Capture and classify then search and find documents using a taxonomy that matches your business practices
- → Comprehensive search functionality made more efficient via use of metadata allows users to quickly find the information they need
- → Eliminate the need for VPN to access work and organizational documents
- → Compatible with owners, owner/operators, investment management firms and REITs
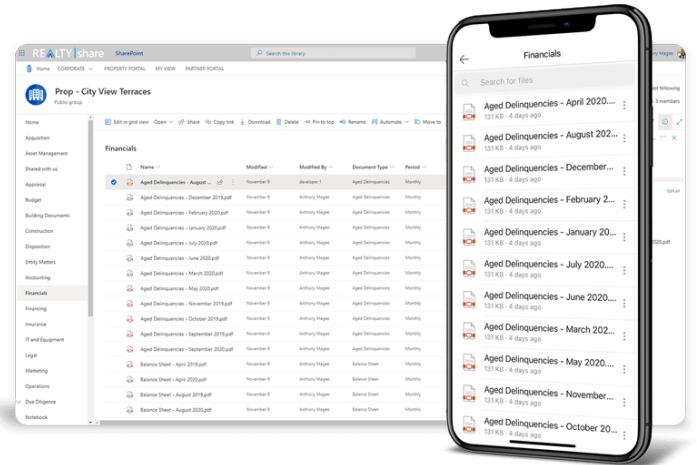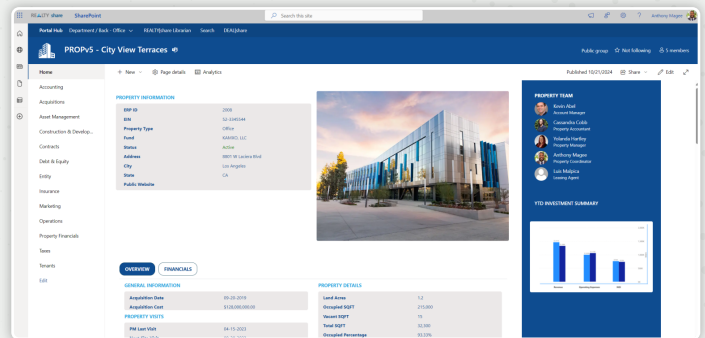
Centralized View of Property Data

View key property-related data in one place. Our property portal surfaces structured property data from all of your applications into one easy to view dashboard.

- → At-a-glance view of occupancy data, financial data, rent roll
- → Quick access to property team members and their contact information

Seamless Collaboration on Asset Documents

Leverage the investment you've already made in SharePoint and Microsoft Teams adoption to collaborate on asset related documents.

- → Real-time collaboration
- → Easy document sharing
- → Integrated updates and notifications
- → Save documents directly into REALTY|share
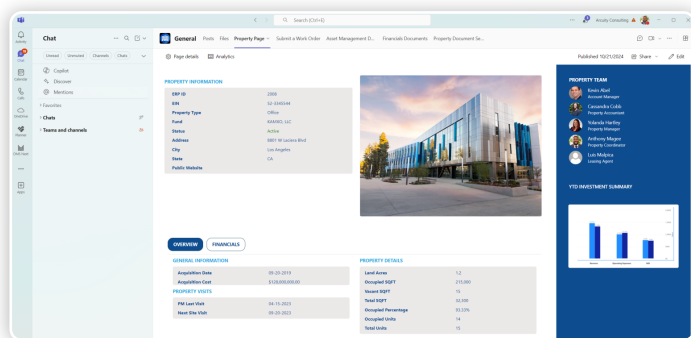
Simplified User Experience

Our integrated Windows desktop solution offers a familiar user interface that is intuitive and simple to use, making your day-to-day work more efficient.
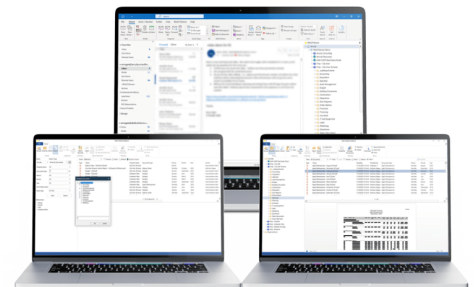
- → Windows Explorer like app allows users to interact with SharePoint in a familiar way
- → Full Microsoft Office integration allows for saving files directly from Word, Excel, PowerPoint and other applications into REALTY|share
- → Work with REALTY|share documents directly from Microsoft Outlook
- → Search Capability permits searching directly from your Windows desktop

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Deal Document Management

Efficient Management of Deal Documents

Track and manage your deal documents throughout the deal lifecycle, then easily migrate to a REALTY|share property site once the deal closes.

→ Capture deal documents associated with single property deals or portfolio deals

→ Move deal documents to REALTY|share property site when a deal closes

→ Search and access documents associated with active, closed and even legacy deals that did not close

DEAL|share   DEAL HUB   DEAL Documents   REALTY|share HUB   Edit
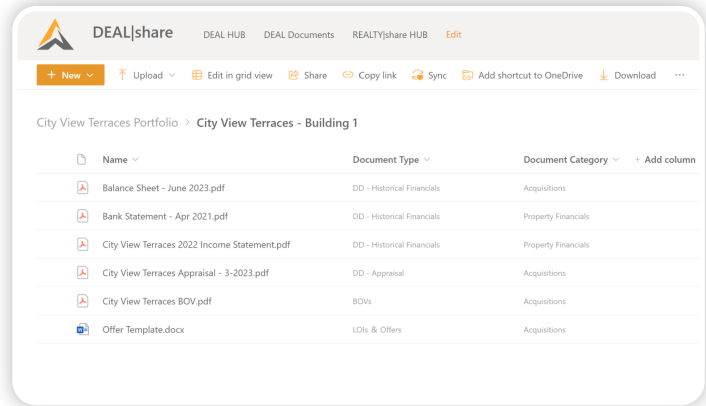
+ New   Upload   Edit in grid view   Share   Copy link   Sync   Add shortcut to OneDrive   Download   ...

City View Terraces Portfolio > City View Terraces - Building 1

Name	Document Type	Document Category	+ Add column
Balance Sheet – June 2023.pdf	DD - Historical Financials	Acquisitions	
Bank Statement – Apr 2021.pdf	DD - Historical Financials	Property Financials	
City View Terraces 2022 Income Statement.pdf	DD - Historical Financials	Property Financials	
City View Terraces Appraisal - 3-2023.pdf	DD - Appraisal	Acquisitions	
City View Terraces BOV.pdf	BOVs	Acquisitions	
Offer Template.docx	LOIs & Offers	Acquisitions	

Yardi Document Management for SharePoint (YDMS) Integration

Effortlessly Connect REALTY|share and YDMS

Rather than save your Yardi documents in the Yardi cloud, take full advantage of the power of SharePoint for document management.

→ Perfect for Yardi customers who want to store both Yardi and non Yardi property documents in a single searchable SharePoint property site

→ Align REALTY|share with your Yardi Document Management for SharePoint (YDMS) implementation and gain the full value of your SharePoint investment
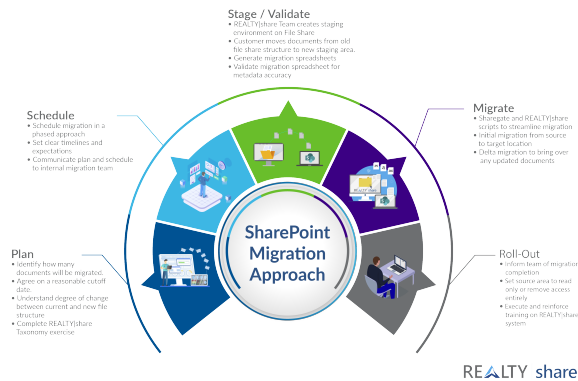
Enhanced Document Management
Use SharePoint's robust capabilities to store and manage both Yardi and non-Yardi property documents in one centralized, searchable property site.

Seamless Integration
Complement your Yardi Document Management for SharePoint (YDMS) by aligning it with REALTY|share for streamlined workflows and improved efficiency.

Effortlessly Connect

Maximize Your SharePoint Investment
Unlock the full potential of SharePoint by integrating it with your YDMS, ensuring a powerful, unified solution for property document management.

Yardi Document Management for SharePoint

Legacy Document Migration

Streamline File Migration to SharePoint

Migrate your old documents to REALTY|share to keep your files accessible and secure. Reduce the painful process of migration with our structured approach.

→ Archive old, unused documents that have been cluttering your file system for decades

→ Migrate terabytes of documents into REALTY|share

→ Source documents from systems including network file shares, older SharePoint systems, file for me, Egnyte and many more

Stage / Validate
• REALTY|share Team creates staging environment on File Share
• Customer moves documents from old file share structure to new staging area.
• Generate migration spreadsheets
• Validate migration spreadsheet for metadata accuracy

Schedule
• Schedule migration in a phased approach
• Set clear timelines and expectations
• Communicate plan and schedule to internal migration team

Migrate
• Shoregate and REALTY|share scripts to streamline migration
• Initial migration from source to target location
• Delta migration to bring over any updated documents

SharePoint Migration Approach

Plan
• Identify how many documents will be migrated.
• Agree on a reasonable cutoff date.
• Understand degree of change between current and new file structure.
• Complete REALTY|share Taxonomy exercise

Roll-Out
• Inform team of migration completion
• Set source area to read only or remove access entirely
• Execute and reinforce training on REALTY|share system

REALTY share

Mobile Access

Access Your Work on the Go

Stay connected to REALTY|share with our 100% cloud-based solution and manage your property documents from anywhere on any device.

→ Full mobile compatibility with iOS and Android

→ Instant access to your SharePoint environment from anywhere provides greater flexibility and ease of access for all users

Financials

Search for files

Aged Delinquencies – April 2020.... 131 KB - 4 days ago
Aged Delinquencies – August 202... 131 KB - 4 days ago
Aged Delinquencies – December... 131 KB - 4 days ago
Aged Delinquencies – February 2... 131 KB - 4 days ago
Aged Delinquencies – January 20... 131 KB - 4 days ago
Aged Delinquencies – July 2020.... 131 KB - 4 days ago
Aged Delinquencies – June 2020.... 131 KB - 4 days ago
Aged Delinquencies – March 202... 131 KB - 4 days ago
Aged Delinquencies – May 2020.... 131 KB - 4 days ago
Aged Delinquencies – November... 131 KB - 4 days ago
Aged Delinquencies – October 20... 131 KB - 4 days ago

REALTY | share